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Improve ROI and Lower Costs by Mastering PeopleSoft Upgrade Tools and Resources

Greg Parikh - Senior Director PeopleSoft Information Development
Scott Schafer - PeopleTools Product Strategy Manager

Program Agenda

- PeopleSoft Information Resources
- PeopleTools – Improve the Upgrade
- Q&A



PeopleSoft Information Resources

Video Feature Overviews



My Total Rewards

Especially Prepared for **Roxanna Channing**

Rewards Period: 01 January 2011 - 31 December 2011 Total Rewards, Statement 2011

This is your Total Rewards statement for the statement period. As you review the statement, you will see that your benefits costs are shared with you for before-tax and your employer.

No amounts are shown in US Dollar currency.

View Summary Chart

Navigation: Compensation, Allocation, Health, Life, Retirement, Disability, Training, Other

This following is a summary of all the Reward items for the period selected above.

Component	Employee Part	Employee Contribution	Employee Payable
Discretionary	190,200.00	0.00	10,000.00
Advantage	220.00	0.00	0.00
Health	0,000.00	10,000.00	0.00
Life	200.00	200.00	0.00
Retirement	0,000.00	0,000.00	0.00
Vacation	0.00	0.00	0,000.00
Training	10,000.00	0.00	0,000.00
Other	0.00	0.00	1,000.00
Rewards Statement Total	213,000.00	21,000.00	10,000.00

PeopleSoft Information Resources

Feature Pack Content

- **Available resources for Feature Packs**
 - **Feature Pack Release Notes**
 - **Cumulative Feature Overview Tool**
 - **Video Release Overviews**
 - **Upgrade and Install Guides**
 - **Updated Hosted PeopleBooks**

PeopleSoft Information Resources

Cumulative Feature Overview & Upgrade Resources Report

“The new CFO tool is invaluable to anyone upgrading their PeopleSoft environments. It should be the first stop on anyone’s upgrade path.”

Tina C. Thames

Beacon Application Services

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PEOPLESOFT ENTERPRISE
HUMAN CAPITAL MANAGEMENT

Cumulative Feature Overview

1) Select product (multiple selections OK):

- Absence Management
- Benefits Administration
- Candidate Gateway
- Directory Interface
- eBenefits
- eCompensation
- eCompensation Manager Desktop
- eDevelopment
- Enterprise Learning Management
- ePay

Select All
Clear All

2) Select your **CURRENT** release (one selection only):

8.0
8.3
8.6
8.9

3) Select your **TARGET** release (one selection only):

8.8
8.9
9.0
9.1

4) Press the button

Run Report...

Select Your Specific Products

Define Your To/From Release Comparison

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Upgrade Resources Report

1) Select your upgrade path:

- HRMS 8.3x to 9.0MPS Upgrade
- HRMS 8.8x to 8.9MPS 1 Upgrade
- HRMS 8.8x to 8.9MPS 1 Upgrade including Pay-Bill Management
- HRMS 8.8x to 9.0MPS Upgrade
- HRMS 8.8x to 9.0MPS Upgrade including Pay-Bill Management
- HRMS 8.8x to 9.1 Upgrade
- HRMS 8.9MPS 1 to 9.0MPS Upgrade
- HRMS 8.9MPS 1 to 9.1 Upgrade
- HRMS 9.0 to 9.1 Upgrade

2) Press the button

Run Report...

PeopleSoft Information Resources

Hosted PeopleBooks

- In eight months (Jan 2011 to August 2011), Hosted PeopleBooks had 25,969,566 Page Views

Searchable

Automatically Updated

Link to "Help" in Your Applications

Select	Order	Person ID	Name	Candidate Type	Status	*Succession Readiness	Target Date
<input type="checkbox"/>	1	KU0044	David Reese	Person	Active	Ready Now	
<input type="checkbox"/>	2	KU0038	Derek Holzinger	Person	Active	1 - 2 Yrs	09/30/2009
<input type="checkbox"/>	3	KU0075	Mar Lee	Person	Active	3 - 5 Yrs	

Link to "Help" in Your Applications

Content Updates

PeopleBooks

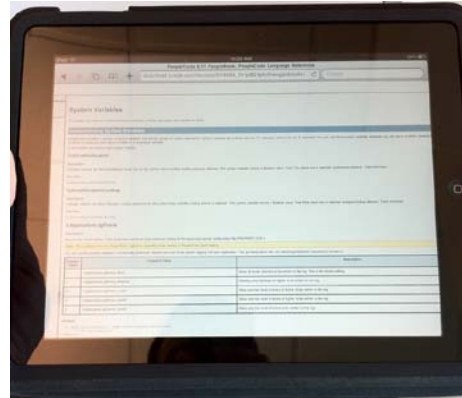
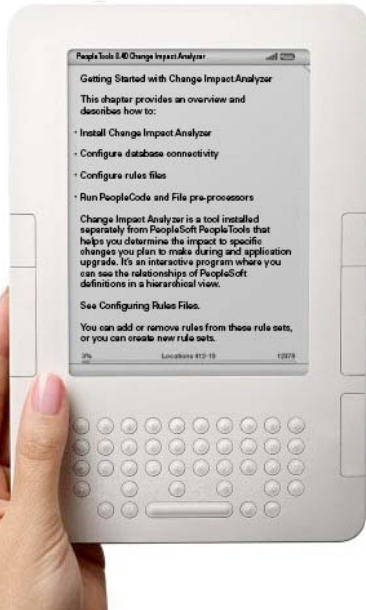
- Customer Relationship Management (CRM)
- Enterprise Learning Management (ELM)
- Enterprise Performance Management (EPM)
- Financial Supply Chain Management (FSCM)
- Human Capital Management (HCM)
- Portal Solutions (PS)
- PeopleTools (PT)
- Corporate Solutions (CS)

PeopleSoft Information Resources

Mobile PeopleBooks

Full suite of PeopleBooks are now available for download on your mobile devices, e-readers, and tablets.

Never be without the information you truly need.



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PeopleSoft Information Resources

PeopleSoft Information Portal

- **Still the best place for all resources related to PeopleSoft.**
- **Information Solution Sheets (One Stop Shop)**

The screenshot displays the Oracle PeopleSoft Enterprise Information Portal. The top navigation bar includes the Oracle logo, a search box, and a 'secure search' button. Below the navigation, the main content area is divided into several sections:

- PeopleSoft Enterprise Information Portal:** A central section providing a single entry point for documentation, training, and other useful information.
- INFORMATION SOLUTION SHEETS:** A section highlighting various information solution sheets available for download, including:
 - PeopleSoft Human Capital Management Information Solution (PDF)
 - PeopleSoft Financial Management Information Solution (PDF)
 - PeopleSoft Enterprise Performance Management Information Solution (PDF)
 - PeopleSoft SCM and SRM Information Solution (PDF)
 - PeopleSoft Customer Relationship Management Information Solution (PDF)
 - PeopleSoft Campus Solution Information Solution (PDF)
 - PeopleSoft Enterprise Portal Information Solution (PDF)
 - PeopleSoft PeopleTools and Technology Information Solution (PDF)
 - Oracle User Productivity Kit for PeopleSoft Enterprise (PDF)
- Technical Information:** A section listing technical resources such as:
 - Using PeopleSoft Change Assistant for Software Updates - Self-Study CD Course
 - Using PeopleSoft Change Assistant for Software Upgrades - Self-Study CD Course

The right-hand sidebar features a promotional banner for the 'Oracle 1-800-633-0738' contact center, a 'Register NOV' event, and a section titled 'HUMAN CAPITAL MANAGEMENT INFORMATION SOLUTIONS' with links to various resources like 'PeopleBooks', 'Webcasts', 'Upgrade Documentation', and 'Getting Started on Your PeopleSoft Upgrade'.

PeopleSoft Information Resources

PeopleSoft Upgrade Advisor

Upgrade Advisor: PeopleSoft FSCM from 8.9 to 9.1 [ID 261.1]

Modified 11-MAY-2011 Type REFERENCE Status PUBLISHED

PeopleSoft FSCM Upgrade from 8.9 to 9.1 > Evaluate

1. Evaluate 2. Plan 3. Configure 4. Test 5. Implement 6. Accept

Phase Overview

Step by Step Guide

- Learn About the Value of Upgrading
- Review Product Enhancements
- Review Product Quality Improvements
- Review Lifetime Support Policy
- Review Potential Environmental Impact
- Review Product Certifications

Overview:

The goal of the UPGRADE - EVALUATE phase is to analyze future and core business requirements and explore new possibilities for the enterprise to improve efficiency, effectiveness, or competitive advantage. Look towards the future and learn from lessons past. Explore software, hardware or operations enhancements.

Areas of Focus:

- o Upgrade Strategy
- o Reduce Customization to Standard functionality
- o New/Additional Technology/Functionality
- o Process Change/Improvement

Expected Outcome / Deliverables:

- o Documented Go / No Go decision for upgrading to a new and specified version
- o Documented understanding of the impact for the business
 - o Expected benefits for the business
 - o Expected costs (people, other resources, time, impact on other systems)
- o Documented Risk Assessment

Scope:

This guided path covers the steps to be followed for evaluating, planning and executing the upgrade of PeopleSoft Enterprise Financials and Supply Chain Management (FSCM) Release 8.9 to PeopleSoft Enterprise FSCM Release 9.1.

Knowledge:

PeopleSoft Enterprise Financials and Supply Chain Management 9.1 Release Notes (FSCM)	Doc ID 986247.1
PeopleSoft Enterprise FSCM 9.1 Maintenance Pack #1 Release Notes (Includes Bundle #1)	Doc ID 1069573.1
PeopleSoft Enterprise FSCM 9.1 Release Value Proposition	Doc ID 832234.1
FMS, ESA, and ALM Cumulative Feature Overview Tool	Doc ID 793151.1
SCM and SRM cumulative Feature Overview Tool	DocID 793155.1
PeopleSoft Enterprise Financials/Supply Chain Management 9.1 Hardware and Software Requirements Guide	Doc ID 965749.1
PeopleSoft Enterprise PeopleTools Certifications	Doc ID 747587.1

News and Announcements

- Oracle Lifetime Support Policy
- Advisor Webcasts: Support Tools and Processes
- Enterprise 9.1 Release news
- Enterprise Upgrade Value Assessment

Multimedia Training

What's New in Oracle's PeopleSoft Enterprise Financial Management 9.1 (MP3, 11 min.)

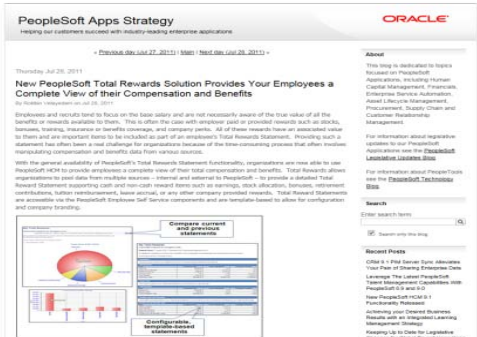
PeopleSoft: For your Upgrade and Expansion Consideration (MP3, 11 min)

Related Resources

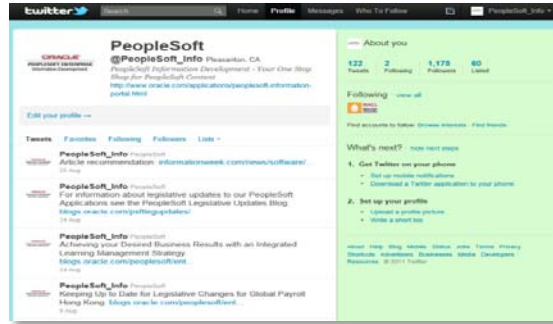
- Delivering Value with Enterprise 9.1 : Financial Management (PDF)

PeopleSoft Information Resources

Social Media



PeopleSoft Apps Strategy Blogs



Twitter



YouTube Channel



Facebook

PeopleSoft Information Resources

Oracle Learning Library and TOIs

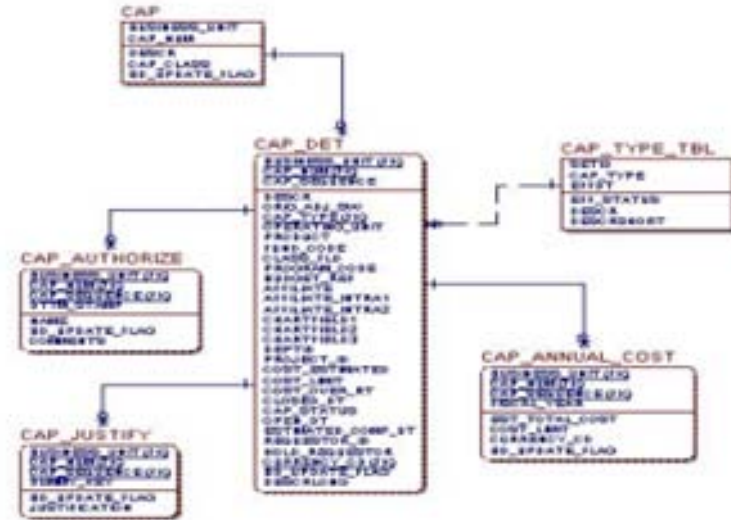
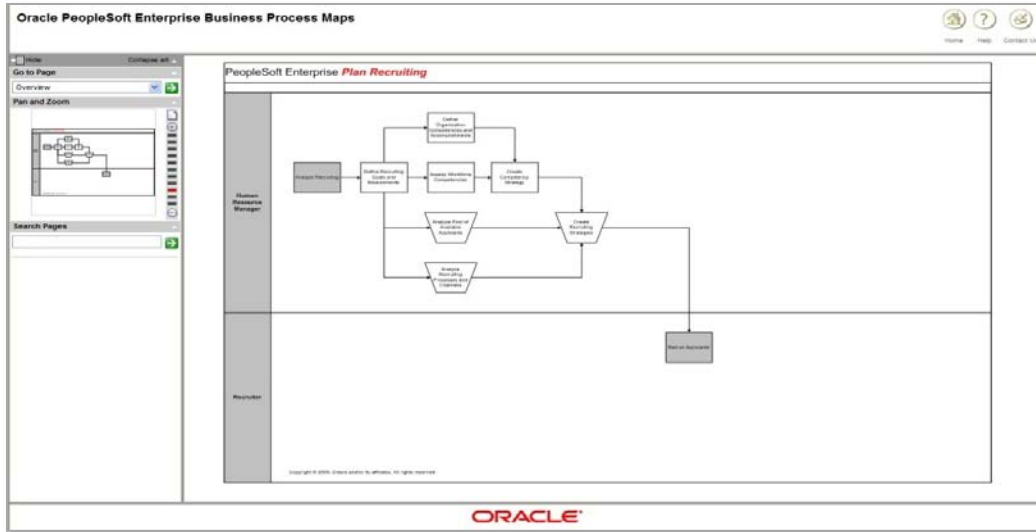
The screenshot shows the Oracle Learning Library homepage. At the top, there is a navigation bar with links for Home, Advanced Search, Bookmarks, My Settings, Administration, and About. Below this is a search bar. The main content area features four featured video courses: 'Video Series - Oracle e-ITS Customer Hours in Oracle 9.0.0.6', 'Oracle 9.1.4 CRM On-Location 90-Days Public', 'Developer 11g Release 2 Tutorial', and 'Oracle BPM 11g Tutorial'. A large category list follows, including Application Development 17.4, Hyperion 13.9, Oracle 11g, Siebel 17, GoldenGate 16, Enterprise Manager 16, BI 14, Security 14, and Installation 12. Below the category list are three sections: 'By Product Family' (listing categories like CRM, ERP, etc.), 'Most Popular in Last Month' (listing popular courses like 'Creating a Reporting Using Oracle BI Administration Tool'), and 'Latest Additions' (listing newly added courses like 'Working with Customizable Design Rules and Transformation Scripts with Oracle 11g').

The screenshot shows the Oracle University website. The top navigation bar includes links for Home, Catalog, Home, Calendar, and Profile. A search bar is prominently displayed. Below the search bar, the page title is 'Browse Subcategories PeopleSoft Enterprise: Human Capital Management'. A list of subcategories related to the selected topic is shown, including Absence Management (Enterprise), Benefits Administration (Enterprise), Compensation (Enterprise), eCompensation (Enterprise), eDevelopment (Enterprise), Enterprise Human Capital Management (General), ePay (Enterprise), ePerformance (Enterprise), eProfile (Enterprise), Global Payroll (Enterprise), Human Resources (Enterprise), Learning Management (Enterprise), Payroll for North America (Enterprise), Payroll Interface (Enterprise), Pension Administration (Enterprise), Recruiting Solutions (Enterprise), Stock Administration (Enterprise), Talent Acquisition Manager (Enterprise), and Time and Labor (Enterprise). At the bottom, a section titled 'Courses in Category PeopleSoft Enterprise: Human Capital Management' lists three TOIs: 'PeopleSoft HCM Career Planning & Succession Planning Functional Overview', 'PeopleSoft HCM Career Planning & Succession Planning Functional Overview', and 'PeopleSoft HCM Compensation Functional Overview'.



PeopleSoft Information Resources

Hosted Business Process Maps and ERDs



PeopleSoft Information Resources

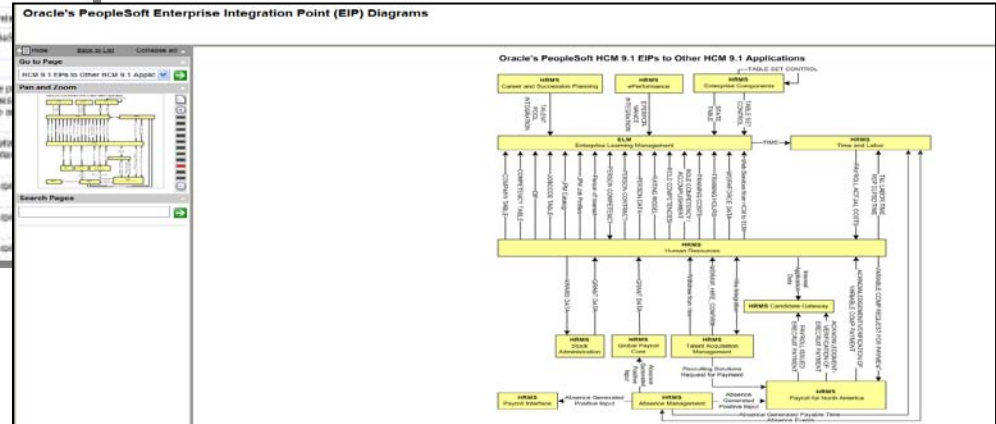
Doc Home Pages and EIP Maps

PeopleSoft Enterprise Human Capital Management 9.1 Documentation Home Page

Check out the [PeopleSoft Enterprise Information Portal](#) for direct access to a wide range of information about PeopleSoft Enterprise HCM products.

HRMS 9.1

Document Link	Description
PeopleSoft HRMS 9.1	Comprehensive reference documentation for all shipped products in online (html) format.
PeopleSoft PDF	Comprehensive reference documentation for all shipped products in PDF format.
Statement of Direction	Provides a high-level overview of features and enhancements included in HRMS 9.1.
Release Value Proposition	Overview of new features and enhancements that act as a roadmap to help you assess the business benefits of upgrading to HRMS 9.1.
Change Notes	Describes new features and technology support changes for the latest upcoming release.
HCM 9.1 to 9.2 Interactive Customer Feature Overview	Provides high-level, concise descriptions of new features and functionality in PeopleSoft HCM since general availability of HRMS 9.1. You should also read the PeopleSoft PeopleTools Hardware Requirements found on My Oracle Support.
Installation Guide	This page contains the PeopleSoft Enterprise HRMS 9.1 installation guide.
Hardware and Software Guide	The PeopleSoft Enterprise HRMS 9.1 Hardware and Software Requirements Guide provides information on hardware and software requirements and optional software packages for PeopleSoft Enterprise HRMS 9.1. You should also read the PeopleSoft PeopleTools Hardware Requirements found on My Oracle Support.
Platform Certifications	View information about currently supported combinations of products, platforms, databases and application servers, browsers, and other products. Please review this certificate approach.
HRMS 9.1 to 9.2 Upgrade	This page contains documentation and related information for the PeopleSoft Enterprise HRMS 9.1 to 9.2 Upgrade.
HRMS 9.1 to 9.1 Upgrade	This page contains documentation and related information for the PeopleSoft Enterprise HRMS 9.1 to 9.1 Upgrade.
HRMS 9.0 to 9.1 Upgrade	This page contains documentation and related information for the PeopleSoft Enterprise HRMS 9.0 to 9.1 Upgrade.



PeopleSoft Information Resources

Fit Gap UPK Tool Kit

- Available Free on My Oracle Support

The screenshot displays the Oracle User Productivity Kit (UPK) interface. On the left, a navigation pane shows a tree structure of topics, with 'Example Topic: Using Benefits—Enrolling in Benefits' selected. The main content area features a toolbar with icons for 'See It!', 'Try It!', 'Know It?', 'Do It!', and 'Print It!'. Below the toolbar, the text reads: 'This topic shows an example of a UPK topic that can be updated or created to show Fit Gap information for a particular feature, fits and gaps.' A bolded section header states: 'This Fit Gap topic discusses eBenefits Enrollments.' Below this, a key instruction is provided: 'During these sessions, identify how your own Benefit Enrollment processes are presented to your employees. Take notes as we will discuss each difference.' The main body of the page contains several paragraphs of text explaining the PeopleSoft eBenefits enrollment process, including details about enrollment events, employee notifications, and the system's handling of current and new coverage information.

PeopleSoft Information Resources

Upcoming Related OU training

PeopleSoft PeopleTools Installation & Server Admin.

<u>Location Sort</u>	<u>Duration</u>	<u>Class Date Sort</u>
✓ CA - Belmont	5 Days	10-Oct-2011
✓ CA - San Francisco	5 Days	12-Dec-2011
✓ FL - Orlando	5 Days	05-Dec-2011
✓ GA - Atlanta	5 Days	26-Mar-2012
✓ IL - Chicago	5 Days	23-Jan-2012
✓ NE - Omaha	5 Days	31-Oct-2011
✓ NJ - Edison	5 Days	24-Oct-2011
✓ NJ - Edison	5 Days	27-Feb-2012
✓ RI - Providence	5 Days	12-Dec-2011
✓ TX - Irving	5 Days	14-Nov-2011
✓ TX - Irving	5 Days	19-Mar-2012
✓ VA - Reston	5 Days	13-Feb-2012

PeopleSoft PeopleTools Upgrade and Data Management

<u>Location Sort</u>	<u>Duration</u>	<u>Class Date Sort</u>
✓ CA - Belmont	5 Days	14-Nov-2011
✓ CA - Belmont	5 Days	19-Mar-2012
✓ CA - San Francisco	4 Days	03-Jan-2012
✓ FL - Coral Gables/Miami	5 Days	12-Dec-2011
✓ MO - Saint Charles	5 Days	28-Nov-2011
✓ RI - Providence	5 Days	07-Nov-2011
✓ TX - Irving	5 Days	19-Dec-2011
✓ TX - Irving	5 Days	13-Feb-2012
✓ VA - Reston	5 Days	23-Jan-2012

PeopleSoft Information Resources

Upcoming Related OU training

PeopleSoft Test Framework

<u>Location Sort</u>	<u>Duration</u>	<u>Class Date Sort</u>
✓ <u>IL - Chicago</u>	3 Days	02-Nov-2011

<u>Location Sort</u>	<u>Duration</u>	<u>Class Date Sort</u>
✓ <u>Online</u>	3 Days	21-Nov-2011
✓ <u>Online</u>	3 Days	14-Dec-2011
✓ <u>Online</u>	3 Days	14-Dec-2011
✓ <u>Online</u>	3 Days	18-Jan-2012
✓ <u>Online</u>	3 Days	29-Feb-2012
✓ <u>Online</u>	3 Days	29-Feb-2012
✓ <u>Online</u>	3 Days	27-Mar-2012

Program Agenda

- PeopleSoft Information Resources
- PeopleTools – Improve the Upgrade
- Q&A



PeopleTools - Improve The Upgrade

Oracle Configuration Manager

- What is it?
 - Configuration collector – includes all layers
 - Captures configuration data to provide more efficient customer service
- Why?
 - Faster problem resolution
 - Improved system stability
- Health Checks
 - Check common issues and recommend corrective actions
 - Visible in My Oracle Support
- Priority Handling
 - SRs logged against configurations are handled first!

PeopleTools - Improve The Upgrade

PeopleSoft Test Framework (PTF)

- Overview

- Introduced in PeopleTools 8.51
- More than just a “Record and Playback” tool
- Integrated with lifecycle management
- Integrated with PeopleTools
- Tests and test cases are PeopleTools managed objects
 - Comparable
 - Copyable
- Enhances data from Usage Monitor and Compare Report

PeopleTools - Improve The Upgrade

PeopleSoft Test Framework – Why?

- Reduce the Cost of Testing
 - Customers say system testing is critical component
- Reduce the Cost of Test Maintenance
 - Integrated into PeopleTools Lifecycle Management
 - Cost of maintaining tests is main reason customers give up on automating system testing
- Reduce Cost of Test Development
 - Easy to use test creation through recording
 - Command Based (No Coding)
 - Test and Test Case Data together in one UI

PeopleTools - Improve The Upgrade

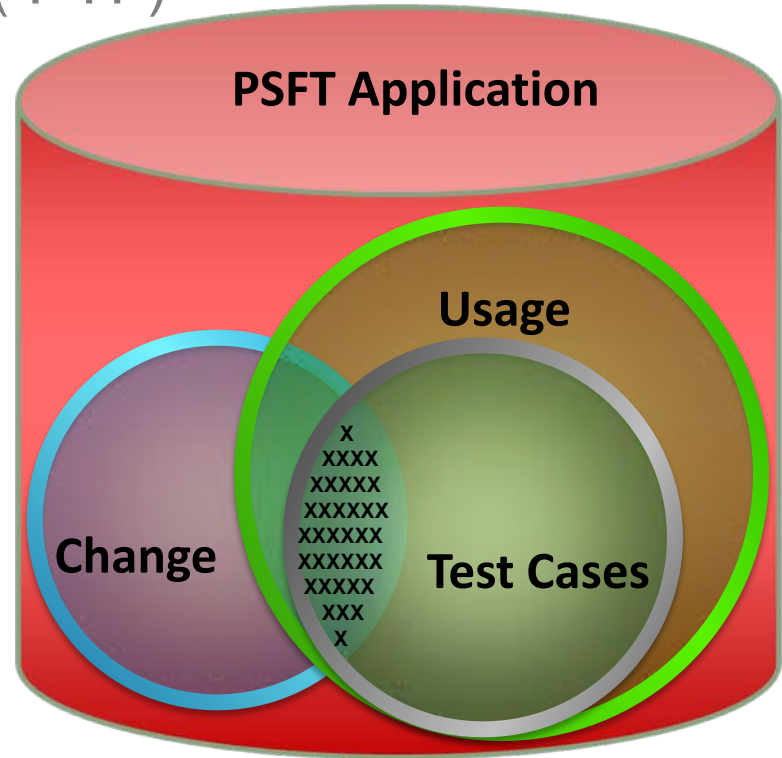
PeopleSoft Test Framework – Why?

- Usage Monitor
 - Critical to impact analysis
 - Understand what objects are used in your application
 - Extends PTF and Compare Report data
- Compare Reports To Tables
 - Stores compare data in application tables
 - Critical to impact analysis
 - Understand what objects are being changed
 - Extends Usage Monitor and PTF data

PeopleTools - Improve The Upgrade

PeopleSoft Test Framework (PTF)

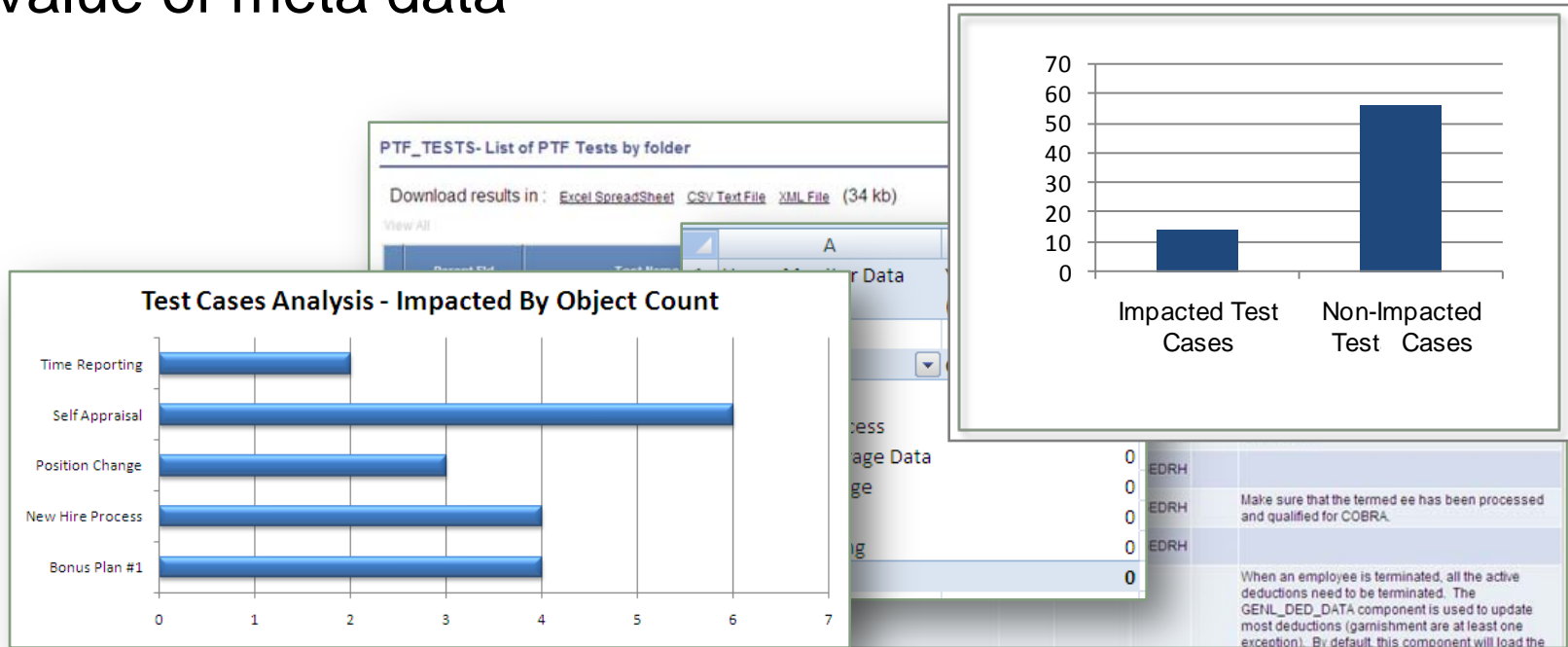
- Application system testing
 - Automated testing
- Impact Analysis
 - Test Maintenance Report
 - Test Coverage Report



PeopleTools - Improve The Upgrade

Impact Analysis

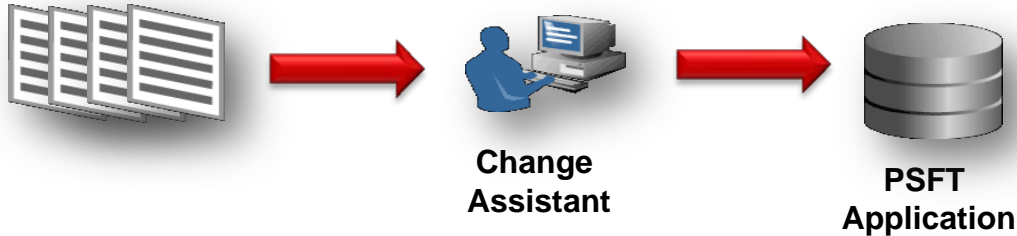
- Value of meta data



PeopleTools - Improve The Upgrade

PeopleSoft Upgrade 9.1/8.50

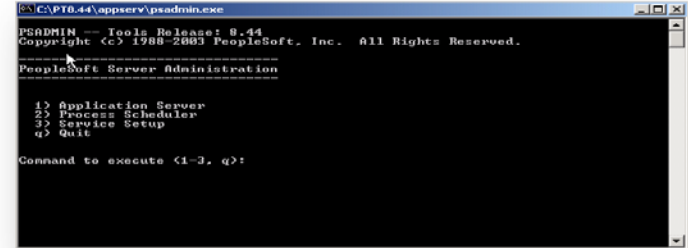
- Upgrade performance improvements
 - Reducing system downtime
 - Upgrade Data Conversion Analyzer
 - Upgrade Data Conversion Runtime



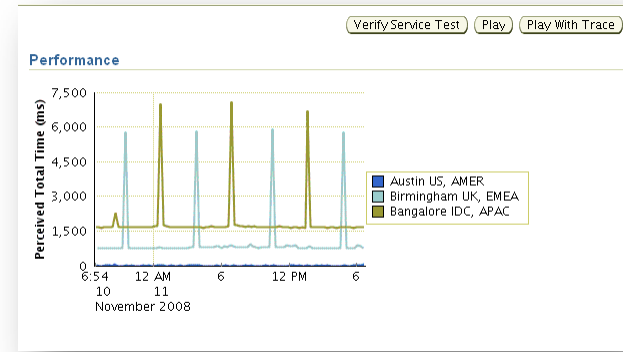
PeopleTools - Improve The Upgrade

Application Management Pack For PeopleSoft

- Introduced with 8.48 PeopleTools
 - 8.52 will be 5th release
- Development themes
 - Day to day management and monitoring
 - Centralized UI
 - Full visibility and management
 - PSFT specific metrics
 - System monitoring and alerting



vs



PeopleTools Sessions of Interest

Monday

Time	Title	Number	Location
11:00	Improve ROI and Lower Costs by Mastering PeopleSoft Upgrade Tools and Resources	14509	Moscone West - 3020
	Mastering PeopleSoft Query	12440	Moscone West - 2024
	PeopleSoft Answers: How to Prevent Hackers from Exploiting Your System	14841	Moscone West - 2022
2:00	Managing Your PeopleSoft Applications with Oracle Enterprise Manager	12420	InterContinental – Union Square
	Performance Tuning for the PeopleSoft Administrator	14023	Moscone West - 2022
	PeopleTools Developer Series: Building and Consuming Web Services	13985	Moscone West - 2024
3:30	PeopleSoft on Oracle Exalogic: A Perfect Fit	14008	Moscone West - 2022
5:00	PeopleTools Product Roadmap	14504	Moscone West – 3002/3004

PeopleTools Sessions of Interest

Tuesday

Time	Title	Number	Location
10:15	PeopleSoft Enterprise: Oracle Database Technical Update	13580	Moscone South - 310
11:45	PeopleSoft Success: Best Practices for Using PeopleSoft Test Framework	14028	Moscone West - 2022
1:15	PeopleSoft Integration Broker in PeopleSoft PeopleTools Release 8.52: Highlights	13987	Moscone West - 2022
	PeopleSoft Answers: How to Create a Great PeopleSoft UI	14020	Moscone West - 2024
3:30	PeopleSoft PeopleTools Tips and Techniques	14003	Moscone West - 2022
	Oracle Fusion Middleware for Oracle Applications: Get Answers from Development	12388	Moscone West - 2016
5:00	Platform Update for PeopleSoft	14007	Moscone West - 2024
	Upgrading to PeopleSoft Feature Pack Releases	14031	Moscone West - 2022

PeopleTools Sessions of Interest

Wednesday

Time	Title	Number	Location
10:15	Application Integration for PeopleSoft Enterprise	12750	Moscone West - 3020
11:45	PeopleSoft PeopleTools Release 8.52: How PeopleSoft's New Search Features Will Change The World	14022	Moscone West - 2022
1:15	PeopleSoft Success: Using Virtualization to Manage TCO	14006	Moscone West - 2024
5:00	Meet the Experts: PeopleSoft PeopleTools	S317455	Moscone West – Applications/CRM Lounge
	PeopleSoft Success: PeopleSoft Portal Creates Great Self-Service Solutions	14010	Moscone West - 2022
	PeopleTools Developer Series: Secure Coding Practices	14001	Moscone West - 2024

PeopleTools Sessions of Interest

Thursday

Time	Title	Number	Location
9:00	PeopleSoft Success: One Strategy for Staying Current and On Track for the Future	14030	Moscone West - 2024
	PeopleSoft Answers: How to Provide Seamless User Access, On-Premises or as SaaS	14842	Moscone West - 2022
	Extending PeopleSoft Applications with Oracle ADF and Oracle SOA Suite	12381	InterContinental – Union Square
10:30	PeopleSoft Answers: How to Enable PeopleSoft for Mobile Users	14000	Moscone West - 2022
12:00	PeopleTools Developer Series: Performance Tips for the PeopleSoft Developer	14026	Moscone West - 2022
1:30	Hands On Lab - Install Release 9.1 of PeopleSoft Human Capital Management in Minutes with Oracle VM	21401	Marriott Marquis - Nob Hill CD
	PeopleSoft PeopleTools Product Team Panel Discussion	14005	Moscone West - 2022
3:00	Hands On Lab - Install Release 9.1 of PeopleSoft Human Capital Management in Minutes with Oracle VM	21401	Marriott Marquis - Nob Hill CD
	PeopleSoft Answers: Oracle Active Data Guard and Oracle GoldenGate for Read-Only	14009	Moscone West - 2022
	PeopleSoft Success: Using the Related Content Framework to Empower Users	14021	Moscone West - 2024

Q&A

Hardware and Software

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